



**ePro Requisitions  
Training Manual  
PS 2254**

**PeopleSoft 9.1**

**City of Kansas City, Missouri**

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## Tips:



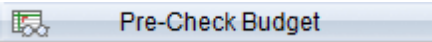
-  
- 
-  to display the Menu
- 
- 
- 
-    on the Layout Page
- % sign is a wild card in PeopleSoft
- Clear Cache – Tools > Internet Options > Delete > OK
- Always  from PeopleSoft (upper right corner). Try not to use the 
- P-Cards – purchases can be made with the Department's P-Cards for up to \$1,500 per transaction with a limit of \$10,000 per month
- Requisition approval thresholds:
  - \$5K or less requires 1<sup>st</sup> level approval
  - Less than \$50K requires 2<sup>nd</sup> level approval
  - Greater than \$50K requires 3<sup>rd</sup> level approval
- Create a Speed Chart:
  - Set Up Financials/Supply Chain > Product Related > Procurement Options > Management > SpeedChart > SpeedChart



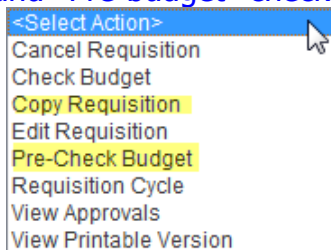
## New Features:

- Embedded Help 
- Zoom  click Return to go back
- Override Option

Default Options ?	
<input checked="" type="radio"/> Default	If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.
<input type="radio"/> Override	If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

- Vendor Name added to the Special item tab
- Requisition Summary on the right side of the screen
- Contract ID default 
- Amount only box 
- Pre-budget check 
- Copy Requisition and Pre-budget check options available on the Manage

Requisition page



- <Select Action>
- Cancel Requisition
- Check Budget
- Copy Requisition
- Edit Requisition
- Pre-Check Budget
- Requisition Cycle
- View Approvals
- View Printable Version

- Contract Information available on the **Requisition Details** page

Contract Information	
SetID	Contract ID
SHARE	<a href="#">000000000000000000004255</a>



## Inquire Budget:

ORACLE

Home | Worklist | MultiChannel Co

Favorites | Main Menu > Commitment Control > Review Budget Activities > Budget Details

### Budget Details

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

**Search Criteria**

Business Unit:	=	KCMBU
Ledger Group:	=	ADMIN
Account:	begins with	601100
Department:	begins with	121050
Operating Unit:	begins with	
Fund Code:	begins with	1000
Class Field:	begins with	
Sub-Field:	begins with	
ABC:	begins with	
PC Business Unit:	begins with	
Project:	begins with	
Activity:	begins with	
Source Type:	begins with	
Budget Period:	begins with	2014
Statistics Code:	begins with	

Search Clear Basic Search Save Search Criteria

### Search Results

View 100 First 1 of 1 Last

Business Unit	Ledger Group	Account	Department	Operating Unit	Fund Code	Class Field	Sub-Field	ABC	PC Business Unit	Project	Activity	Source Type	Budget Period	Statistics Code
KCMBU	ADMIN	601100	121050	(blank)	1000	(blank)	(blank)	(blank)	(blank)	(blank)	(blank)	(blank)	2014	(blank)

Navigate to the above Page.

Enter the Chartfield information. Click **Search**

Following are the **Ledger Group:** options:

View 100 First 1-10 of 10 Last

Ledger Group	Description	Ledger Group Type
ADMIN	Admin Budget Ledger	Expense
APPROP	Approp Budget Ledger	Expense
CAP_ADMIN	Continuing Fund Tracking	Expense
CAP_APPROP	Continuing Fund Appropriation	Expense
CAP_REV	Capital Revenue Budget Ledger	Revenue
KCPDU	Admin Budget Ledger	Expense
PROJECT	PROJECT BUDGET LEDGER	Expense
PR_PARENT	Projects/Grants Parent Budget	Expense
REVENUE	Revenue Budget Ledger	Revenue



## City of Kansas City, Missouri ePro Requisitions Training Manual

ORACLE

Home | Worklist | MultiChannel Co

Favorites | Main Menu > Commitment Control > Review Budget Activities > Budget Details

New Window ? Help

### Commitment Control Budget Details

Business Unit	Ledger Group	Fund	DeptID	Account	Project	Budget Period
KCMBU	ADMIN	1000	121050	601100		2014

Display Chart ⓘ

#### Ledger Amounts

Budget:	1,478,148.49 USD			<b>Max Rows:</b> 100 <a href="#">Attributes</a> <a href="#">Parent/Children</a> <a href="#">Associated Budgets</a>
Expense:	377,784.81 USD			
Encumbrance:	6,029.00 USD			
Pre-Encumbrance:	195.00 USD			
Associate Revenue:	0.00 USD			

#### Available Budget

Without Tolerance:	1,094,139.68	USD	Percent:	(74.02%)	<a href="#">Forecasts</a>
With Tolerance:	1,094,139.68	USD	Percent:	(74.02%)	

#### Budget Exceptions

Exception Errors:	0	Exception Warnings:	0	Budget Exceptions
-------------------	---	---------------------	---	-------------------

The above page displays the total Budget, Expenses, Encumbrances, Pre-Encumbrances and Available Budget.

Click the Activity Log icon to review Pre-Encumbrances for the requisitions.



## City of Kansas City, Missouri ePro Requisitions Training Manual

ORACLE®

Home | Worklist | My

Favorites | Main Menu > Commitment Control > Review Budget Activities > Budget Details

New Window

### Activity Log

Ledger: ADMIN\_PRE

Display open pre-encumbrances only: ☐

Activity Log														Personalize	Find	View All	First	1-57 of 57	Last
	Tran Line	Document Label	Document ID	Ref Bdgt?	Fund	DeptID	Account	Project	Budget Period	Year	Period	Foreign Amount	Fore Curr						
	1	Purchase Order:	1200000814	Y	1000	121050	601100		2014	2014	6	-3.00	U						
	1	Purchase Order:	1200000817	Y	1000	121050	601100		2014	2014	6	0.00	U						
	1	Purchase Order:	1200000818	Y	1000	121050	601100		2014	2014	6	0.00	U						
	2	Purchase Order:	1200000818	Y	1000	121050	601100		2014	2014	6	0.00	U						
	1	Purchase Order:	1200000819	Y	1000	121050	601100		2014	2014	6	-4.00	U						
	2	Purchase Order:	1200000819	Y	1000	121050	601100		2014	2014	6	-9.00	U						
	1	Purchase Order:	1200000816	Y	1000	121050	601100		2014	2014	6	-8.00	U						
	2	Purchase Order:	1200000816	Y	1000	121050	601100		2014	2014	6	-1.00	U						
	1	Purchase Order:	1200000821	Y	1000	121050	601100		2014	2014	6	-150,000.00	U						
	1	Purchase Order:	1200000822	Y	1000	121050	601100		2014	2014	6	-10.00	U						
	2	Purchase Order:	1200000822	Y	1000	121050	601100		2014	2014	6	0.00	U						
	1	Purchase Order:	1200000824	Y	1000	121050	601100		2014	2014	6	-6,000.00	U						
	1	Purchase Order:	1200000837	Y	1000	121050	601100		2014	2014	6	0.00	U						
	2	Purchase Order:	1200000837	Y	1000	121050	601100		2014	2014	6	0.00	U						
	1	Purchase Order:	1200000838	Y	1000	121050	601100		2014	2014	6	-10.00	U						

OK

The above **Activity Log** Page will display all the Requisitions as well as the POs that were sourced from the Requisitions.



City of Kansas City, Missouri  
ePro Requisitions Training Manual

ORACLE®

Home | Worklist

Favorites | Main Menu > Commitment Control > Review Budget Activities > Budget Details

New W

**Activity Log**

Ledger: ADMIN\_PRE

Display open pre-encumbrances only: ☒

**Activity Log** Personalize | Find | View All | First 1-22 of 22 Last

	Tran Line	Document Label	Document ID	Ref Bdgt?	Fund	DeptID	Account	Project	Budget Period	Year	Period	Foreign Amount	Fore Curr
	2	Purchase Order:	1200000816	Y	1000	121050	601100		2014	2014	6	-1.00 U	
	2	Purchase Order:	1200000822	Y	1000	121050	601100		2014	2014	6	0.00 U	
	1	Purchase Order:	1200000837	Y	1000	121050	601100		2014	2014	6	0.00 U	
	2	Purchase Order:	1200000837	Y	1000	121050	601100		2014	2014	6	0.00 U	
	1	Requisition ID:	1200000639	N	1000	121050	601100		2014	2014	6	5.00 U	
	1	Requisition ID:	1200000645	N	1000	121050	601100		2014	2014	6	5.00 U	
	2	Requisition ID:	1200000645	N	1000	121050	601100		2014	2014	6	-1.00 U	
	1	Requisition ID:	1200000648	N	1000	121050	601100		2014	2014	6	12.00 U	
	1	Requisition ID:	1200000649	N	1000	121050	601100		2014	2014	6	10.00 U	
	2	Requisition ID:	1200000649	N	1000	121050	601100		2014	2014	6	-4.00 U	
	2	Requisition ID:	1200000651	N	1000	121050	601100		2014	2014	6	-5.00 U	
	1	Requisition ID:	1200000653	N	1000	121050	601100		2014	2014	6	3.00 U	
	1	Requisition ID:	1200000654	N	1000	121050	601100		2014	2014	6	20.00 U	
	2	Requisition ID:	1200000654	N	1000	121050	601100		2014	2014	6	6.00 U	
	1	Requisition ID:	1200000659	N	1000	121050	601100		2014	2014	6	50.00 U	

OK

Add a check mark ☒ to display Pre-Encumbrances only on the **Activity Log** Page. This will display the requisitions only.





The screenshot displays the Oracle Procurement Contracts interface within a Windows Internet Explorer browser window.

**Browser Information:**

- Title Bar: PO\_Contracts - Windows Internet Explorer
- Address Bar: http://psdevappf1.kc.lan:14310/psp/PSPSTST/EMPLOYEE/ERP/c/EQAW\_APPROVAL\_WORKFLOW.EQAW\_PRC
- Navigation Menu: File Edit View Favorites Tools Help
- Favorites Bar: PQ\_Contracts
- Page Navigation: Home Worklist MultiChannel Console Add to Favorites Sign out

**Application Interface:**

- Breadcrumbs: Favorites Main Menu > Procurement Contracts > Add/Update Contracts
- Action Buttons: New Window, Help, http
- Section Header: Contract Entry
- Description: Enter any information you have and click Search. Leave fields blank for a list of all values.
- Tabs: Find an Existing Value, Add a New Value
- Section Header: Search Criteria

**Search Criteria Fields:**

- SetID: = SHARE
- Contract ID: begins with EV0320
- Version Status: =
- Contract Process Option: =
- Short Vendor Name: begins with
- Vendor Name: begins with bill
- Master Contract ID: begins with
- Options: Correct History, Case Sensitive
- Buttons: Search, Clear, Basic Search, Save Search Criteria

**Search Results:**

View 100 First 1-11 of 11 Last

SetID	Contract ID	Contract Version	Version Status	Contract Process Option	Vendor ID	Short Vendor Name	Vendor Name	Expire Date	Contract Status	Master Contract ID
SHARE	105420-01	1	Current	General	0000030292	BILL IRELA-001	BILL IRELAND & ASSOC. INC	06/25/2007	Approved	(blank)
SHARE	0000000000000000000000003870	1	Current	General	0000072959	BILLIE JEA-001	BILLIE JEAN MILLS	12/31/2012	Approved	(blank)
SHARE	0000000000000000000000003487	2	Current	General	0000072959	BILLIE JEA-001	BILLIE JEAN MILLS	04/30/2014	Approved	(blank)
SHARE	0000000000000000000000003487	1	History	General	0000072959	BILLIE JEA-001	BILLIE JEAN MILLS	04/30/2012	Approved	(blank)
SHARE	P44203	1	Current	Order	0000000010	BILLS FLOO-001	BILLS FLOOR MACHINE SERV	11/30/2006	Approved	(blank)
SHARE	EV0320	1	Current	General	0000000010	BILLS FLOO-001	BILLS FLOOR MACHINE SERV	07/31/2014	Open	(blank)
SHARE	0000000000000000000000004248	2	Current	Order	0000000010	BILLS FLOO-001	BILLS FLOOR MACHINE SERV	12/31/2015	Approved	0000000008
SHARE	0000000000000000000000004248	1	History	Order	0000000010	BILLS FLOO-001	BILLS FLOOR MACHINE SERV	12/01/2014	Approved	0000000008
SHARE	0000000000000000000000004247	1	Current	General	0000000010	BILLS FLOO-001	BILLS FLOOR MACHINE SERV	12/31/2014	Approved	(blank)
SHARE	0000000000000000000000004247	1	Current	General	0000000010	BILLS FLOO-001	BILLS FLOOR MACHINE SERV	12/31/2014	Approved	(blank)

Local intranet | Protected Mode: Off 100% 11:09 AM 11/11/2013

Click 

---

ePro Requisition Class



## City of Kansas City, Missouri ePro Requisitions Training Manual

The screenshot displays the Oracle PO Contracts application interface. The main section is titled "Contract Entry Contract". It shows the following details:

- SetID:** SHARE
- Contract ID:** EV0320
- \*Status:** Approved (highlighted in yellow)
- Administrator/Buyer:** dwilliford46 / Williford, Donna
- Contract Version:** Version: 1, Status: Current, Approved Date: 04/01/2007
- Header:**
  - Process Option:** General Contract
  - \*Vendor:** BILLS FLOO-001
  - \*Vendor ID:** 0000000010 / BILLS FLOOR MACHINE SERV
  - Begin Date:** 04/01/2007
  - Expire Date:** 07/31/2014 (highlighted in yellow)
  - Renewal Date:**
  - Currency:** USD / CRRNT
  - Primary Contact:**
  - Vendor Contract Ref:**
  - Description:** Floor Machines/Maintenance KCI
  - Master Contract ID:**
  - ☐ Tax Exempt
- Amount Summary:**
  - Maximum Amount:** 200,000.00 USD
  - Line Item Released Amount:** 0.00
  - Category Released Amount:** 0.00
  - Open Item Released Amount:** 149,728.40
  - Total Released Amount:** 149,728.40
  - Remaining Amount:** 50,271.60 (highlighted in yellow)
  - Remaining Percent:** 25.14
- Order Contract Options:**
  - ☒ Allow Multicurrency PO
  - ☒ Allow Open Item Reference
  - ☒ Corporate Contract
  - ☐ Adjust Vendor Pricing First
  - ☐ Lock Chartfields
  - ☒ Price Can Be Changed on Order
  - ☐ Must Use Contract Rate Date
  - ☒ Auto Default
  - Rate Date:** 04/11/2007
  - \*Dispatch Method:** Print / Dispatch

A contract can be used if the:

**\*Status:** Approved status must be valid

**Expire Date:** 07/31/2014 expiry date should be greater than today's date

**Remaining Amount:** 50,271.60 remaining amount is greater than or equal to the encumbrance. Contracts have no impact on the per-encumbrance. You can add a contract that has less money than the pre-encumbrance. However, a PO(E) cannot be processed unless the contract has enough money.



## Look Up a Vendor:

**ORACLE**

Favorites | Main Menu > Vendors > Vendor Information > Add/Update > Vendor

**Vendor Information**

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

**Search Criteria**

SetID:

=

SHARE

Vendor ID:

begins with

0000000010

Persistence:

=

Short Vendor Name:

begins with

Our Customer Number:

begins with

Name 1:

begins with

☐ Include History

☐ Correct History

☐ Case Sensitive

Search

Clear

Basic Search

Save Search Criteria

Find an Existing Value | [Add a New Value](#)

Enter the Vendor ID on this page

Click

Search



## City of Kansas City, Missouri ePro Requisitions Training Manual

ORACLE®

Home | Worklist

Favorites | Main Menu > Vendors > Vendor Information > Add/Update > Vendor

New

Summary | Identifying Information | Address | Contacts | Location | Custom

<b>SetID:</b>	SHARE	
<b>Vendor ID:</b>	0000000010	
<b>Vendor Short Name:</b>	BILLS FLOO	BILLS FLOO-001
<b>Vendor Name:</b>	BILLS FLOOR MACHINE SERV	
<b>Order:</b>	BILLS FLOO-001	<b>Remit To:</b> Bills FLOO-001
	1225 TRACY	1225 TRACY
	KANSAS CITY, MO 64106	KANSAS CITY, MO 64106
<b>Status:</b>	Approved	<b>Last Modified By:</b> mshah
<b>Persistence:</b>	Regular	<b>Last modified date:</b> 10/18/2013 8:35AM
<b>Classification:</b>	Outside Party	<b>Created By:</b>
<b>HCM Class:</b>		<b>Created Date/time:</b>
<b>Open for Ordering:</b>	Yes	<b>Last Activity Date:</b> 11/11/2013
<b>Withholding:</b>	Yes	

Save Return to Search Notify Add Update/Display Include History Correct History

Summary | Identifying Information | Address | Contacts | Location | Custom

A vendor must be in Approved Status to do business with the City.

View other Tabs for more information.



## Create a Requisition:

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > eProcurement > Create Requisition

### Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: DEP12 Finance

\*Requester: mshah Shah, Mian

Requisition Name:

eBuilder Ref ID:

\*Currency: USD

Priority: Medium

Line Defaults ?

Continue

Help - Line Defaults

Entering Changes to the Requisition

Use the Line Defaults group box to change or add field values to the entire requisition. As you add items to this requisition, the values of this group box are applied to the new requisition line based on your default option. The Default Options group box determines how the field values are applied.

Requisition Summary

There are no lines on this request. Please add new line in order to save this requisition.

Total Lines: 0

Total Amount (USD): 0

When you click the [Create Requisition](#) link, the above screen displays.

Business Unit should default to your setting, which is your Department.  
Requester should default to your User ID.

You can enter the [Requisition Name:](#) to identify your requisition, if not, this field will be populated with the requisition #. If you add the Requisition Name, it will have both the Name and the System generated # after you save the requisition.

Currency is USD

Priority defaults to Medium. It has no impact on the requisition. It only helps if you are running Reports to identify how many were created in High, Medium or Low priorities.

Click the [Line Defaults ?](#)

[?](#) The embedded Help icon provides information about a section on the Page.

New Requisition Summary Box -



## City of Kansas City, Missouri ePro Requisitions Training Manual

ORACLE®

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > eProcurement > Create Requisition

Help

### Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: DEP12 Finance eBuilder Ref ID: Currency: USD Priority: Medium

\*Requester: mshah Shah, Mian

Requisition Name:

Line Defaults

Default Options

☒ Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

☐ Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Vendor: Vendor Location: Buyer: Category: Unit of Measure:

Shipping Defaults

Ship To: G50 Due Date: Attention: Modify Onetime Address

Accounting Defaults

Chartfields1 Details Asset Information Personalize | Find | First 1 of 1 Last

Pet	Location	GL Unit	Fund	DeptID	Account	Sub-Field	ABC	Oper Unit	PC Bus Unit	Project
	G50	KCMBU	1000	121050	601100					

Continue

**Requisition Summary**  
There are no lines on this request. Please add new line in order to save this requisition.  
Total Lines: 0  
Total Amount (USD): 0

### Enter Line Defaults

☒ **Override** If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Vendor: Buyer:

Category: Unit of Measure:

Requisitions will workflow to the Buyer you select in the after the requisition is approved in the Department.

Buyer: swang49

### Enter Shipping Defaults:

Ship To: G50 Due Date:

You can leave the Attention: blank. The System will add your

name on the **3. Review and Submit** Tab.



Enter **Accounting Defaults** :

Accounting Defaults										
Personalize   Find   First 1 of 1 Last										
Chartfields1 Details Asset Information										
Pct	Location	GL Unit	Fund	DeptID	Account	Sub-Field	ABC	Oper Unit	PC Bus Unit	Project
	G50	KCMBU	1000	121050	601100					

Most of the data from this page will default to the

**2. Add Items and Services** and **3. Review and Submit** tabs.

Account

The data is not migrated unless you select the ☒ **Override** button.

Open the Details Tab

Open the Asset Information Tab. The data from this Tab will migrate to the Assets Module, if a Receiver is created. You can Capitalize an asset or leave the box blank.

Click



## City of Kansas City, Missouri ePro Requisitions Training Manual

ORACLE®

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > eProcurement > Create Requisition

### Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

[Catalog](#) [Favorites](#) [Templates](#) [Forms](#) [Web](#) [Special Request](#)

Select a Request Type ?

<a href="#">Special Item</a>	Request an item that is not listed in the Catalog.
<a href="#">Fixed Cost Service</a>	Request a one-time service for a flat fee.
<a href="#">Variable Cost Service</a>	Request a service for which the fee is based on the time worked.
<a href="#">Time and Materials</a>	Request a service for which the fee is based on the time worked and materials used.

[Review and Submit](#)

**Requisition Summary**  
There are no lines on this request.  
Please add new line in order to save this requisition.

Total Lines:	0
Total Amount (USD):	0

Go to [Special Request](#) Tab

Click [Special Item](#)





## City of Kansas City, Missouri ePro Requisitions Training Manual

Add **\*Item Description:** \_\_\_\_\_,

**\*Price:** \_\_\_\_\_ and **\*Quantity:** \_\_\_\_\_.

Other information should default from the **1. Define Requisition** Tab

Add Line Comments and select if Comments need to be sent to ☐ **Send to Vendor**,  
☐ **Show at Receipt**, ☐ **Show at Voucher**

Scroll down and click **Add Item**

Add more line items, if needed

Click **3. Review and Submit** Tab after all line items are added.



## City of Kansas City, Missouri ePro Requisitions Training Manual

**ORACLE**

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > eProcurement > Create Requisition

### Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: DEP12 Finance \*Currency: USD  
\*Requester: mshah Shah, Mian Priority: Medium  
Requisition Name:

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Test	BILLS FLOOR MACHINE SERV	1.0000	Each	2.00000	2.00

Select All / Deselect All Total Amount: 2.00 USD

Add to Favorites | Add to Template(s) | Modify Line / Shipping / Accounting | Delete

Comments ?

☐ Send to Vendor ☐ Show at Receipt ☐ Shown at Voucher ☐ Approval Justification [More Comments](#)


Check Budget | Pre-Check Budget

Save & submit | Save & preview approvals | Cancel requisition | [Find more items](#)

**Requisition Summary**

Description	Qty	UOM
Test	1	EA

Total Lines: 1  
Total Amount (USD): 2.00

Line level comments can be entered on this Page as well, scroll to the right and click the  icon. The comments on this Page will override the ones on tab. The following page will be displayed.

**ORACLE**

Favorites | Main Menu > eProcurement > Create Requisition

### Line Comments

Business Unit: DEP12 Requisition Date: 11/11/2013  
Requisition ID: NEXT Status: Open Line: 1

Comments Find First 1 of 1 Last

[Use Standard Comments](#) Entered On: 11/11/2013 11:41:16AM

1 << AAAAAA >>

☒ Send to Vendor ☒ Show at Receipt ☒ Show at Voucher

Add Attachments

OK Cancel

You can enter comments and 

Click  when done.



and click the Line Detail icon, . The following page will open.




☐ **Amount Only** check this box, if you want the PO by AMT


Click to select a contract Contract ID: 0000000000000000000000004247

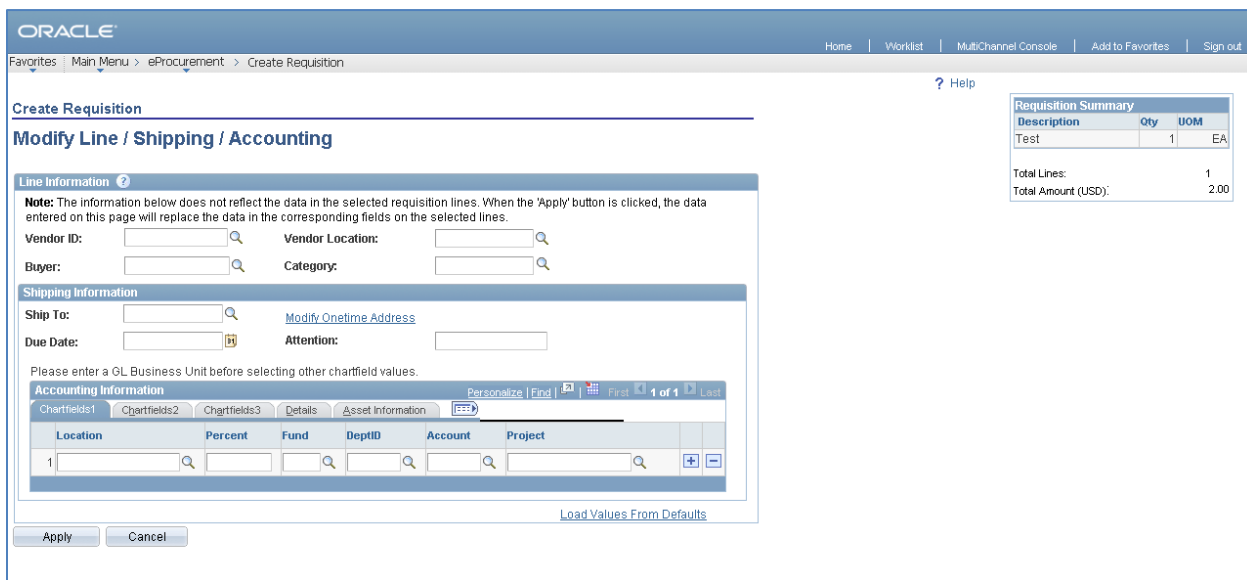
Click 

Note: If a contract is not added, the System will select the most recent contract if one is available, and add it to the PO during the Sourcing process.



Back on the  **3. Review and Submit** Tab, add a check mark  to the line(s) before opening the  **Modify Line / Shipping / Accounting** link.

Click  **Modify Line / Shipping / Accounting** to change requisition lines data. This is an efficient way to modify, if changes are the same for a multi-line requisition. If each line is charged to a separate account, then accounts should be modified at the line level. However, vendor and buyer can still be changed on this page.



**ORACLE**

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > eProcurement > Create Requisition

**Create Requisition**

**Modify Line / Shipping / Accounting**

**Line Information**

Note: The information below does not reflect the data in the selected requisition lines. When the 'Apply' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines.

Vendor ID:  Vendor Location:

Buyer:  Category:

**Shipping Information**

Ship To:  [Modify Onetime Address](#)

Due Date:  Attention:

Please enter a GL Business Unit before selecting other chartfield values.

**Accounting Information**

Chartfields1 | Chartfields2 | Chartfields3 | Details | Asset Information

Location	Percent	Fund	DeptID	Account	Project
1					

[Load Values From Defaults](#)

Apply Cancel

**Requisition Summary**

Description	Qty	UOM
Test	1	EA

Total Lines: 1  
Total Amount (USD): 2.00

Make changes, and

Click 



ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > eProcurement > Create Requisition

? Help

### Distribution Change Options

For the selected requisition lines, apply distribution changes to

- ☒ **All Distribution Lines**  
Apply changes to all existing distribution lines.
- ☐ **Matching Distribution Lines**  
Apply changes to each existing distribution line by matching the distribution line numbers.
- ☐ **Replace Distribution Lines**  
Remove the existing distribution lines and replace with the distribution lines changes.

OK Cancel

Description	Qty	UOM
Test	1	EA
Total Lines:		1
Total Amount (USD):		2.00

### Distribution Change Options

page defaults to

#### ☒ **All Distribution Lines**

Apply changes to all existing distribution lines.

Click  if you want changes made to all lines.



## City of Kansas City, Missouri ePro Requisitions Training Manual

**ORACLE**

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites Main Menu

### Edit Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

**Business Unit:** DEP12 Finance **\*Currency:** USD  
**Requester:** mshah Shah, Mian **Priority:** Medium  
**Requisition Name:** 1200000676

#### Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Test	BILLS FLOOR MACHINE SERV	1.0000	Each	2.00000	2.00

☐ Consolidate with other Reqs ☒ Override Suggested Vendor

**Shipping Line:** 1 **Due Date:** 11/11/2013 **Quantity:** 1.0000 **Price:** 2.00000  
**Status:** Active **\*Ship To:** G50 [Modify Onetime Address](#)  
**Attention To:** abc [Add Shipto Comments](#)  
**\*Distribute By:** Qty **SpeedChart:** **\*Liquidate by:** Amt

#### Accounting Lines

Line	Status	*Location	Percent	Fund	DeptID	Account	Merchandise Amt	Quantity	PC Bus Unit
1	Open	G50	100.0000	1000	121050	601100	2.00	1.0000	

☐ Select All / Deselect All

**Total Amount:** 2.00 USD  
**Pre-Encumbrance Balance:** 2.00 USD

[Add to Favorites](#) [Add to Template\(s\)](#) [Modify Line / Shipping / Accounting](#) [Delete](#)

#### Comments

☐ Send to Vendor ☐ Show at Receipt ☐ Shown at Voucher ☐ Approval Justification [More Comments](#)

[Check Budget](#) [Pre-Check Budget](#)  
[Save & submit](#) [Save & preview approvals](#) [Cancel Changes](#) [Find more items](#)

If you do not use the [Modify Line / Shipping / Accounting](#) page to correct the accounts information, then make changes on the line.

**Account**

601100

Correct the data. It always defaults to 999999.

Click [Check Budget](#) to budget check pre-encumbrance or [Pre-Check Budget](#) to provisionally check the budget. This will not hold funds as pre-encumbrance.



## City of Kansas City, Missouri ePro Requisitions Training Manual

Line	Status	Location	Percent	Fund	DeptID	Account	Merchandise Amt	Quantity	PC Bus Unit
1	Open	G50	100.0000	1000	121050	601100	3.00	1.0000	

The above Message screen will open.

Click OK

Budget Checking Status: **Valid** will be displayed. If budget has an error, then look up the Commitment Control to verify that enough funding is available.

Note: Click Add to Favorites to add this requisition to your Favorite list


Click to Delete selected items from this requisition. You select items using the check box to the left of the item description.

Cancel Changes This button is only active if you have saved the requisition, and have edited it to make changes. Click the Cancel Changes button to revert to the previously saved version.

Click Cancel requisition to cancel the entire requisition. The system displays a warning message before the cancellation.



## City of Kansas City, Missouri ePro Requisitions Training Manual

Click  Save & preview approvals to preview approvals

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu

? Help

### Confirmation

Requested For:	Shah, Mian	Number of Lines:	1
Requisition Name:	1200000676	Total Amount:	2.00 USD
Requisition ID:	1200000676	Pre-Encumbrance Balance:	2.00 USD
Business Unit:	DEP12		
Status:	Open		
Priority:	Medium		
Budget Status:	<a href="#">Valid</a>		

### eProcurement Workflow

Requisition 1200000676: Initiated

ePro Requisition Approvals

Not Routed → Not Routed

Multiple Approvers  
DEP12 121050 Approver 1

Simpson, Ronnell  
eProcurement Buyer

Submit | Edit Requisition | Apply Approval Changes | Check Budget | Pre-Check Budget

[View printable version](#) | [Manage Requisitions](#) | [Create New Requisition](#)

Description	Qty	UOM
Test	1	EA
Total Lines:	1	
Total Amount (USD):	2.00	

Click  Save & submit to submit the requisition for approval

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu

? Help

### Confirmation

Requested For:	Shah, Mian	Number of Lines:	1
Requisition Name:	1200000676	Total Amount:	2.00 USD
Requisition ID:	1200000676	Pre-Encumbrance Balance:	2.00 USD
Business Unit:	DEP12		
Status:	Pending		
Priority:	Medium		
Budget Status:	<a href="#">Valid</a>		

### eProcurement Workflow

Requisition 1200000676: Pending [Request Information](#) [Start New Path](#)

ePro Requisition Approvals

Pending → Not Routed

Multiple Approvers  
DEP12 121050 Approver 1


Simpson, Ronnell  
eProcurement Buyer

Submit | Edit Requisition | Apply Approval Changes | Check Budget | Pre-Check Budget

[View printable version](#) | [Manage Requisitions](#) | [Create New Requisition](#)

Description	Qty	UOM
Test	1	EA
Total Lines:	1	
Total Amount (USD):	2.00	

The above page will be displayed

Click the  link to see who received the requisition for approval





## City of Kansas City, Missouri ePro Requisitions Training Manual

**ORACLE**

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > eProcurement > Create Requisition

? Help

### Confirmation

Requested For: Shah, Mian      Number of Lines:      Total Amount:      Pre-Encumbrance Balance:

Requisition Name: 1200000677

Requisition ID: 1200000677

Business Unit: DEP12

Status: Pending

Priority: Medium

Budget Status: [Valid](#)

### eProcurement Workflow

Requestion 1200000677: Pending [Request Information](#) [Start New Path](#)

**ePro Requisition Approvals**

**Pending** [Multiple Approvers](#) [DEP12 121050 Approver 1](#) → **Not Routed** [Simpson, Ronnell](#) [eProcurement Buyer](#)

[Submit](#) [Edit Requisition](#) [Apply Approval Changes](#) [Check Budget](#) [Pre-Check Budget](#)

[View printable version](#) [Manage Requisitions](#) [Create New Requisition](#)

http://psdevappf1.kc1an:14310/psc/...

**Approver #1**

Name: Shah, Mian  
Empl ID: 100230  
Department: 121050  
Supervisor ID:  
Telephone:  
Reports To Position Number: 204376  
Email ID: mian.shah@kcmo.org

**Approver #2**

Name: Williams, Rusty  
Empl ID: 100282  
Department: 121050  
Supervisor ID:  
Telephone:  
Reports To Position Number: 60206666  
Email ID: mian.shah@kcmo.org

[Close](#)

Description	Qty	UOM
Test 2	1	EA

Total Lines: 1  
Total Amount (USD): 3.00

The small window displays the Users receiving the requisition for approval

Click [Close](#) to close the small window

Click the [Edit Requisition](#) if you need to go back and make changes to the requisition



## City of Kansas City, Missouri ePro Requisitions Training Manual

**Confirmation**

Requested For: Shah, Mian      Number of Lines: 1  
Requisition Name: 1200000677      Total Amount: 3.00 USD  
Requisition ID: 1200000677      Pre-Encumbrance Balance: 3.00 USD  
Business Unit: DEP12  
Status: Pending  
Priority: Medium  
Budget Status: Valid

**Requisition Summary**

Description	Qty	UOM
Test 2	1	EA
Total Lines:	1	
Total Amount (USD):	3.00	

**Message**

This requisition is pending approval. Editing this requisition may reinitialize approval process. (18036,6248)

OK Cancel

**eProcurement Workflow**

Requisition 1200000677: Pending

**ePro Requisition Approvals**

Pending: Multiple Approvers (DEP12 121050 Approver 1) → Not Routed: Simpson, Ronnell (eProcurement Buyer)

Buttons: Submit, Edit Requisition, Apply Approval Changes, Check Budget, Pre-Check Budget

Links: View printable version, Manage Requisitions, Create New Requisition

If you modify an approved requisition, the approvals are removed and the Budget Status is not Valid. After making the required changes, you will need to re-budget check the requisition.

Budget Checking Status: **Valid**

will be displayed and a Requisition # will be assigned.

Click OK

Click the Save & preview approvals to view approval routing

Click Save & submit to route the requisition for approval.



## Note:

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu

? Help

### Confirmation

Requested For:	Shah, Mian	Number of Lines:	1
Requisition Name:	1200000677	Total Amount:	4.00 USD
Requisition ID:	1200000677	Pre-Encumbrance Balance:	3.00 USD
Business Unit:	DEP12		
Status:	Open		
Priority:	Medium		
Budget Status:	Not Checked		

### eProcurement Workflow

Requisition 1200000677: Initiated

ePro Requisition Approvals

Not Routed → Not Routed

Multiple Approvers  
DEP12 121050 Approver 1

Simpson, Ronnell  
eProcurement Buyer

Submit | Edit Requisition | Apply Approval Changes | Check Budget | Pre-Check Budget

[View printable version](#) | [Manage Requisitions](#) | [Create New Requisition](#)

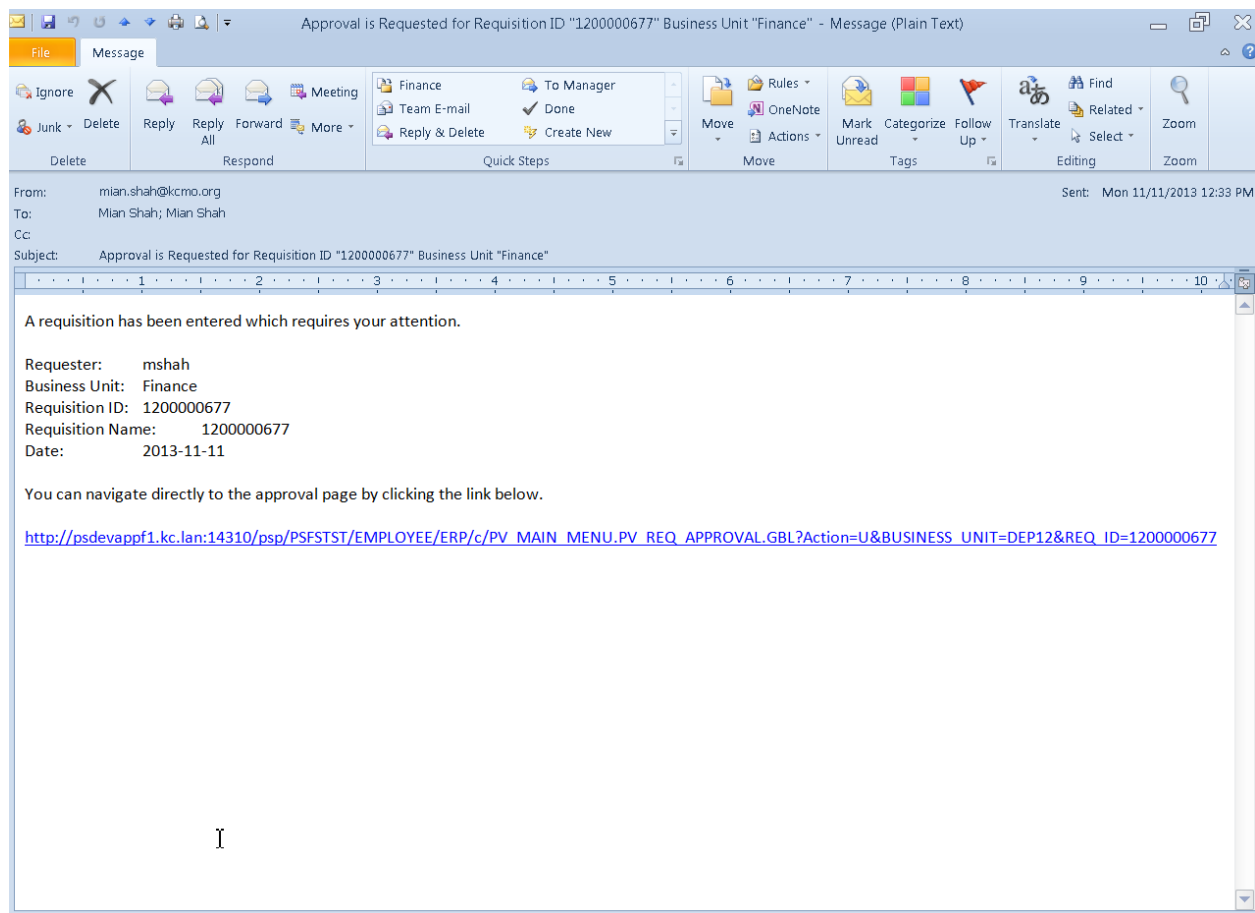
Description	Qty	UOM
Test 2	1	EA

Total Lines: 1  
Total Amount (USD): 4.00

You can  or  and  
 for approval from the above page as well.



## City of Kansas City, Missouri ePro Requisitions Training Manual



User with the 1<sup>st</sup> level approval will receive an e-mail to approve the requisition.

Click the  icon to open the requisition as shown in the screen shot



## City of Kansas City, Missouri ePro Requisitions Training Manual

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Worklist > Worklist

New Window ? Help Personalize Page http

Worklist for mshah: Shah, Mian

Detail View Work List Filters: Approval Routing Feed

From	Date From	Work Item	Worked By Activity	Priority	Link		
Liu, Charity	10/17/2013	Approval Routing	Approval Workflow	3-Low	<a href="#">VoucherApproval, 202, DEP12, 1902-01-02, N, 0, BUSINESS UNIT:DEP12 VOUCHER ID:12040824 RDC:RA,0,0</a>	MarkWorked	Reassign
Parshall, Sue	10/17/2013	Approval Routing	Approval Workflow	3-Low	<a href="#">VoucherApproval, 203, DEP12, 1902-01-02, N, 0, BUSINESS UNIT:DEP12 VOUCHER ID:12040833 RDC:RA,0,0</a>	MarkWorked	Reassign
Parshall, Sue	10/17/2013	Approval Routing	Approval Workflow	3-Low	<a href="#">VoucherApproval, 222, DEP12, 1902-01-02, N, 0, BUSINESS UNIT:DEP12 VOUCHER ID:12040834 RDC:RA,0,0</a>	MarkWorked	Reassign
Parshall, Sue	10/17/2013	Approval Routing	Approval Workflow	3-Low	<a href="#">VoucherApproval, 232, DEP12, 1902-01-02, N, 0, BUSINESS UNIT:DEP12 VOUCHER ID:12040835 RDC:RA,0,0</a>	MarkWorked	Reassign
Parshall, Sue	10/17/2013	Approval Routing	Approval Workflow	3-Low	<a href="#">VoucherApproval, 233, DEP12, 1902-01-02, N, 0, BUSINESS UNIT:DEP12 VOUCHER ID:12040836 RDC:RA,0,0</a>	MarkWorked	Reassign
Shah, Mian	10/21/2013	Approval Routing	Approval Workflow	2-Medium	<a href="#">Requisition, 165901, DEP12, 2013-06-12, N, 0, BUSINESS UNIT:DEP12 REQ ID:1200000653</a>	MarkWorked	Reassign
Parshall, Sue	10/29/2013	Approval Routing	Approval Workflow	2-Medium	<a href="#">Requisition, 165951, DEP12, 2013-06-12, N, 0, BUSINESS UNIT:DEP12 REQ ID:1200000655</a>	MarkWorked	Reassign
Parshall, Sue	11/04/2013	Approval Routing	Approval Workflow	2-Medium	<a href="#">Requisition, 166043, DEP12, 2013-06-12, N, 0, BUSINESS UNIT:DEP12 REQ ID:1200000660</a>	MarkWorked	Reassign
Shah, Mian	11/11/2013	Approval Routing	Approval Workflow	2-Medium	<a href="#">Requisition, 166234, DEP12, 2013-06-12, N, 0, BUSINESS UNIT:DEP12 REQ ID:1200000676</a>	MarkWorked	Reassign
Shah, Mian	11/11/2013	Approval Routing	Approval Workflow	2-Medium	<a href="#">Requisition, 166238, DEP12, 2013-06-12, N, 0, BUSINESS UNIT:DEP12 REQ ID:1200000677</a>	MarkWorked	Reassign

Refresh

Click the [Requisition, 166238, DEP12, 2013-06-12, N, 0, BUSINESS UNIT:DEP12 REQ ID:1200000677](#) to open the Requisition for approval.

You can also navigate to the following page to open a requisition for approval.



**ORACLE**Home

Favorites | Main Menu > eProcurement > Manage Requisition Approvals

### Manage Requisition Approvals

**Search Requisitions**

To locate requisitions that require your approval (or requisitions that previously required your approval), edit the criteria below and click the Search button.

<b>Requisition ID:</b>	<input type="text" value="1200000677"/>	<b>Requisition Name:</b>	<input type="text"/>
<b>Business Unit:</b>	<input type="text" value="DEP12"/>	<b>*Status:</b>	<input type="text" value="Pending"/>
<b>Date From:</b>	<input type="text" value="11/11/2012"/>	<b>Date To:</b>	<input type="text" value="11/11/2013"/>
<b>Requester:</b>	<input type="text"/>	<b>Entered by:</b>	<input type="text"/>

[Show Advanced Search](#)

**Requisitions**

To approve or deny one or more pending requisitions, select the appropriate action from the dropdown and click submit. To view the complete details of a requisition, click the Requisition ID link.

[Expand All](#) [Collapse All](#)

Action/Status	Req ID	Requisition Name	Bus. Unit	Date	Requester	Entered By	Total
<input type="button" value="Pending"/>	<a href="#">1200000677</a>	1200000677	DEP12	11/11/2013	Shah, Mian	Shah, Mian	4.00 USD

**Mark All:** ☒ [Approve](#) ☒ [Deny](#) ☒ [Hold](#)

[Create New Requisition](#) [Manage Requisitions](#)

Click the requisition number [1200000677](#)



ORACLE®

Home | Worklist

Favorites | Main Menu > eProcurement > Manage Requisition Approvals

---

### Requisition Approval

**Business Unit:** DEP12  
**Requisition ID:** 1200000677  
**Requisition Name:** 1200000677  
**Requester:** [Shah, Mian](#)  
**Entered on:** 11/11/2013  
**Status:** Pending **Total Amount:** 4.00 USD  
**Priority:** Medium  
**Budget Status:** Not Checked  
**Requester's Justification:**  
*No justification entered by requester.*

[View printable version](#)

---

#### Line Information ?

Line Information Personalize | Find | First 1 of 1 | Last

	Line	Item Description	Vendor Name	Quantity	UOM	Price	
<input checked="" type="checkbox"/>	1	Test 2	UZ ENGINEE-001	1.0000	EA	4.00000	USD

[Select All / Deselect All](#)  
 [Additional Requisition Information](#)

---

#### Review/Edit Approvers

##### eProcurement Workflow

Requisition 1200000677: Pending [View/Hide Comments](#) [Request Information](#) [Start New Path](#)

ePro Requisition Approvals

**Pending**  
Multiple Approvers  
DEP12 121050 Approver 1

→ **Not Routed**  
Simpson, Ronnell  
eProcurement Buyer

[Comment History](#)

---

#### Enter Approver Comments

[Return to Approve Requisitions](#) [Approval History](#) [Previous in List](#) [Next in List](#)

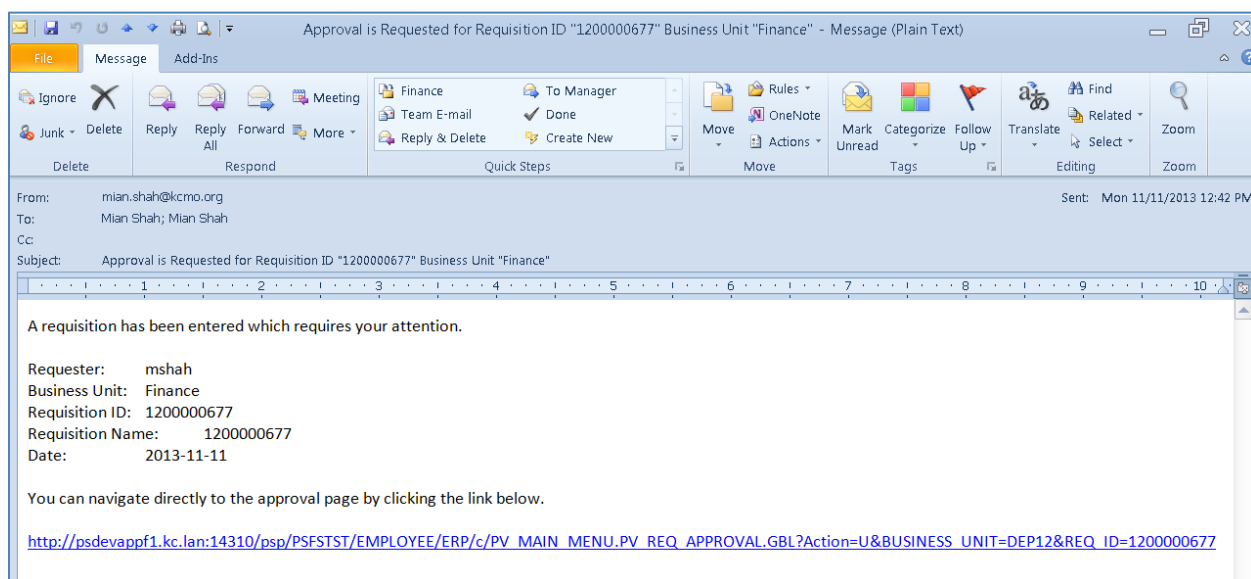
Enter comments in the Approval Comments box.

Click for approval.

After requisition approval, it will go to the Buyer.

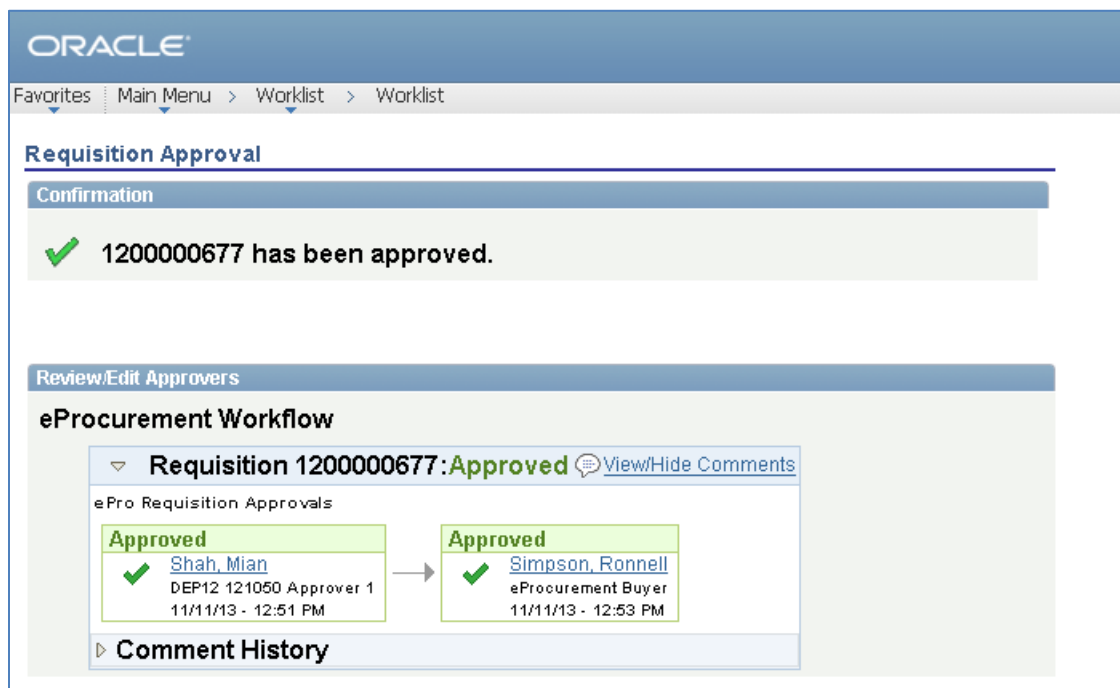


## City of Kansas City, Missouri ePro Requisitions Training Manual



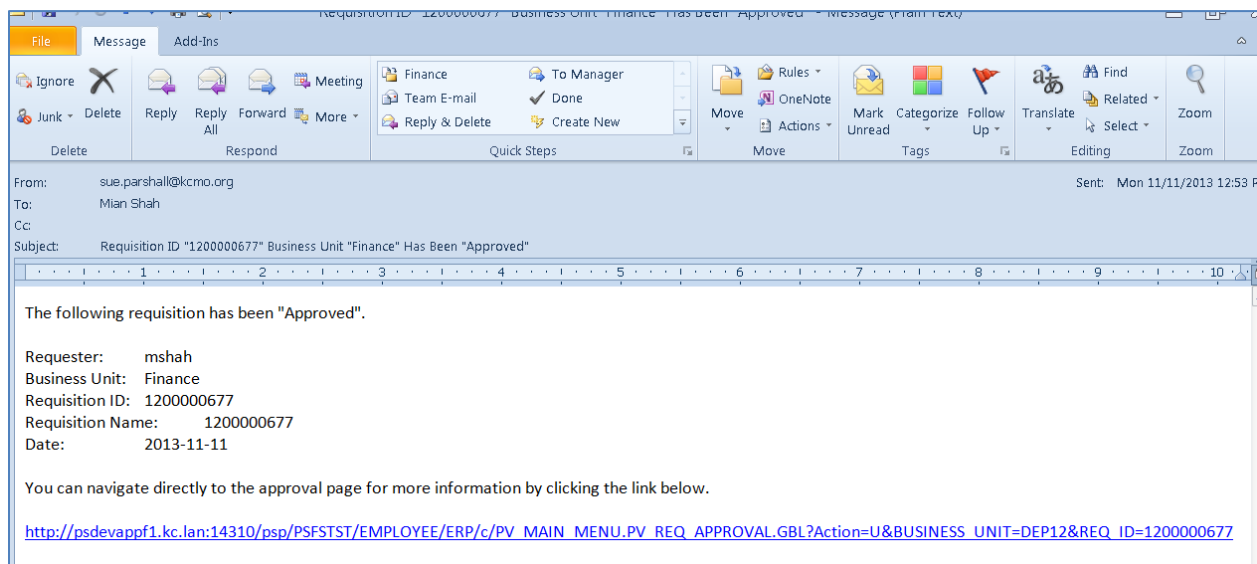
The Buyer will receive an e-mail for the requisition





The Buyer approves the Requisition.

eProcurement Workflow displays the Requisition is Approved at all levels.



An e-mail is sent to the **initiator** that the requisition has been approved by the Buyer.



## City of Kansas City, Missouri ePro Requisitions Training Manual

### Note:

**ORACLE**

Requisition - Windows Internet Explorer

http://psdevappf1.kc.lan:14310/psc/PSFSTST/view/FILEDB\_XI

File Edit View Favorites Tools Help

Search

Requisition

**Business Unit:** DEP12  
**Requisition ID:** 1200000676  
**Requisition Name:** 1200000676  
**Requester:** Shah, Mian  
**Entered on:** 11/11/2013  
**Status:** Pending  
**Priority:** Medium  
**Budget Status:** Valid  
**Requester's Justification:** No justification entered by requester.

**Requester:** mshah  
**Requested By:** Shah, Mian  
**Entered Date:** 11/11/13  
**Status:** Pending Approval  
**Currency:** USD  
**Requisition Total:** 2.00

**Line: 1** Item Description: Test Quantity: 1.0000 UOM: EA Price: 2.00 Line Total: 2.00 Line Status: Pending

**Line Comments:**  
<< AAAAAAA >>

**Ship Line: 1** Ship To: G50 Address: FINANCE DEPT - ACCOUNTS DIV  
Attention: abc Due Date: 11/11/13 CITY HALL - 3RD FLOOR WEST  
414 E. 12TH STREET  
KANSAS CITY MO 64106  
United States

**Shipping Quantity:** 1.0000  
**Shipping Total:** 2.00

Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account
1	Open	G50	1.0000	100.00	2.00	KCMBU	601100

Dept	Fund
121050	1000

Open QTY	Open Amt
1.0000	0.000

GL Base Amount	Currency	Sequence
2.00	USD	0

**Review/Edit Approvers**

**eProcurement Workflow**

**Requisition 1200000676**

**Pending**

**Multiple Approvers**

DEP12 121050 Approver 1

**Enter Approver Comments**

Done

Local intranet | Protected Mode: Off

100%

Add a check mark to the line and click **View Line Details** The above screen will be displayed.



## City of Kansas City, Missouri ePro Requisitions Training Manual

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > eProcurement > Manage Requisition Approvals

### ePro Req Approval Details

<b>Requisition</b>	<b>Business Unit</b>	<b>Requester</b>	<b>Req Date</b>
1200000676	DEP12	Shah, Mian	11/11/2013

---

**Line 1**    Test

**Comments**    AAAAAA

<b>Qty</b>	<b>Price</b>	<b>Total</b>	<b>UOM</b>	<b>Curr</b>
1.0000	2.00000	2.00	EA	USD

**Buyer**    Simpson, Ronnell

**Contract**    0000000000000000000000004247    **Line**

---

<b>Sched Num</b>	<b>Ship To</b>	<b>Attention To</b>	<b>Due Date</b>
1	G50	abc	11/11/2013

<u>GL Business Unit</u>	<u>Fund</u>	<u>DeptID</u>	<u>Account</u>	<u>Sub-Field</u>	<u>ABC</u>	<u>Operating Unit</u>	<u>PC Business Unit</u>	<u>Project</u>	<u>Activity</u>	<u>Source Type</u>	<u>Category</u>	<u>Subcategory</u>	<u>Class</u>	<u>Location</u>
1 KCMBU	1000	121050	601100											G50

Click [Additional Requisition Information](#) to display the above page for additional requisition information.



**Note:**

ORACLE®

Home | Worklist | Mu

Favorites | Main Menu > eProcurement > Manage Requisition Approvals

---

**Requisition Approval**

**Business Unit:** DEP12  
**Requisition ID:** 1200000676  
**Requisition Name:** 1200000676  
**Requester:** [Shah, Mian](#)  
**Entered on:** 11/11/2013  
**Status:** Pending **Total Amount:** 5,001.00 USD  
**Priority:** Medium  
**Budget Status:** Valid  
**Requester's Justification:**  
No justification entered by requester.

[View printable version](#)

**Line Information** ?

Line Information

Line	Item Description	Vendor Name	Quantity	UOM	Price	Requester's Comments
1	Test	BILLS FLOO-001	1.0000	EA	5001.00000	USD

[Additional Requisition Information](#)

**Review/Edit Approvers**

**eProcurement Workflow**

**Requisition 1200000676: Pending** [View/Hide Comments](#)

ePro Requisition Approvals

**Approved** [Shah, Mian](#)  
DEP12 121050 Approver 1  
11/11/13 - 1:10 PM

**Pending** [Williams, Rusty](#)  
DEP12 121050 Approver 2

**Not Routed** [Simpson, Ronnell](#)  
eProcurement Buyer

**Comment History**

**Enter Approver Comments**

[Return to Approve Requisitions](#) [Approval History](#) [Previous in List](#) [Next in List](#)

When you have more than two levels of approval, then a requisition can be

,  or

sends the requisition back to the initiator.  sends it back to the last approver.



**Note:**

ORACLE

Home | Wordlist | Multic

Favorites | Main Menu > eProcurement > Manage Requisition Approvals

### Requisition Approval

**Business Unit:** DEP12  
**Requisition ID:** 1200000676  
**Requisition Name:** 1200000676  
**Requester:** [Shah, Mian](#)  
**Entered on:** 11/11/2013  
**Status:** Pending **Total Amount:** 5,001.00 USD  
**Priority:** Medium  
**Budget Status:** Valid  
**Requester's Justification:**  
No justification entered by requester.

[Edit Requisition](#) [View printable version](#)

**Line Information**

Line	Item Description	Vendor
1	Test	BILLS

[Select All / Deselect All](#)  
[View Line Details](#)

**Review/Edit Approvers**

### eProcurement Workflow

**Requisition 1200000676: Pending** [View/Hide Comments](#)

ePro Requisition Approvals

**Approved** [Shah, Mian](#) DEP12 121050 Approver 1 11/11/13 - 1:10 PM → **Pending** [Williams, Rusty](#) DEP12 121050 Approver 2 → **Not Routed** [Simpson, Ronnell](#) eProcurement Buyer

**Comment History**

**Enter Approver Comments**

[Approve](#) [Deny](#) [Pushback](#)

[Return to Approve Requisitions](#) [Approval History](#) [Previous in List](#) [Next in List](#)

If you [Deny](#) or [Pushback](#) a requisition without a Comment, the above message will be displayed. A Comment is required.



Work List Filters:										Feed	
Approval Routing										Personalize   Find   View All	
Journal Approval										First 1-25 of 26 Last	
U	Date From	Work Item	Worked By Activity	Pri							
Sh, Shana	08/02/2013	Approval Routing	Approval Workflow		Requisition, 165813, DEP14, N.0, BUSINESS UNIT:DEP14 REQ ID:140000042					Mark/Worked	Reassign
son, Ronnell	10/10/2013	Approval Routing	Approval Workflow	2-Medium	Requisition, 165791, DEP12, 2013-06-12, N.0, BUSINESS UNIT:DEP12 REQ ID:1200000644					Mark/Worked	Reassign
y, Anne	10/17/2013	Approval Routing	Approval Workflow	3-Low	VoucherApproval, 234, DEP12, 1902-01-02, N.0, BUSINESS UNIT:DEP12 VOUCHER ID:12040838 RDC:RA.0.A					Mark/Worked	Reassign
y, Anne	10/17/2013	Approval Routing	Approval Workflow	3-Low	VoucherApproval, 235, DEP12, 1902-01-02, N.0, BUSINESS UNIT:DEP12 VOUCHER ID:12040839 RDC:RA.0.A					Mark/Worked	Reassign
y, Anne	10/17/2013	Approval Routing	Approval Workflow	3-Low	VoucherApproval, 236, DEP12, 1902-01-02, N.0, BUSINESS UNIT:DEP12 VOUCHER ID:12040840 RDC:RA.0.A					Mark/Worked	Reassign
hall, Sue	10/21/2013	Approval Routing	Approval Workflow	3-Low	VoucherApproval, 273, DEP12, 1902-01-02, N.0, BUSINESS UNIT:DEP12 VOUCHER ID:12040843 RDC:RA.0.A					Mark/Worked	Reassign
hall, Sue	10/21/2013	Approval Routing	Approval Workflow	3-Low	VoucherApproval, 274, DEP12, 1902-01-02, N.0, BUSINESS UNIT:DEP12 VOUCHER ID:12040842 RDC:RA.0.A					Mark/Worked	Reassign
hall, Sue	10/21/2013	Approval Routing	Approval Workflow	3-Low	VoucherApproval, 282, DEP12, 1902-01-02, N.0, BUSINESS UNIT:DEP12 VOUCHER ID:12040844 RDC:RA.0.A					Mark/Worked	Reassign
n, Mian	10/21/2013	Approval Routing	Approval Workflow	2-Medium	Requisition, 165901, DEP12, 2013-06-12, N.0, BUSINESS UNIT:DEP12 REQ ID:1200000653					Mark/Worked	Reassign
Charity	10/22/2013	Approval Routing	Approval Workflow	3-Low	VoucherApproval, 334, DEP10, 1902-01-02, N.0, BUSINESS UNIT:DEP12 VOUCHER ID:12040812 RDC:RA.0.A					Mark/Worked	Reassign
Charity	10/22/2013	Approval Routing	Approval Workflow	3-Low	VoucherApproval, 335, DEP10, 1902-01-02, N.0, BUSINESS UNIT:DEP12 VOUCHER ID:12040818 RDC:RA.0.A					Mark/Worked	Reassign

Select the **Approval Routing**



## Print a Requisition:

**Manage Requisitions**

**Search Requisitions**

To locate requisitions, edit the criteria below and click the Search button.

**Business Unit:**  **Requisition Name:**

**Requisition ID:**  **Request Status:**  **Budget Status:**

**Date From:**  **Date To:**  **PO ID:**

**Requester:**  **Entered By:**

**Requisitions**

To view the lifespan and line items for a requisition, click the Expand triangle icon.

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total
<a href="#">1200000671</a>	1200000671	DEP12	11/07/2013	PO(s) Created	Valid	16.00 USD

[Create New Requisition](#) [Review Change Request](#) [Review Change Tracking](#) [Manage Receipts](#) [Requisition Report](#)

Open a Requisition that needs printing.

Click the [Requisition Report](#) link



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Favorites | Main Menu > eProcurement > Manage Requisitions

New Window ? Help http

### Requisition Print

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

**Search Criteria**

Run Control ID: begins with

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria


### Search Results

View All First 1-6 of 6 Last

Run Control ID
DISPATCH_PO
PS_PO_DISPATCH_DEFAULT
Print_PO
RECEIPT_DELIVERY-mshah
RECV-DLY-mshah
mshah

Find an Existing Value | Add a New Value

Click 

Select a Run Control ID; if none exists then create one by clicking the  tab





## City of Kansas City, Missouri ePro Requisitions Training Manual

Enter the **Business Unit:** , and the

**Requisition ID:**

Populate the **Statuses to Include** as shown

Click 

Click 



## City of Kansas City, Missouri ePro Requisitions Training Manual

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### Process Scheduler Request

User ID: mshah Run Control ID: mshah

Server Name:  Run Date: 11/11/2013

Recurrence:  Run Time: 4:58:29PM

Time Zone: CST  Central Time (US)

Process List						
Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Requisition Print SQR	PORQ010	SQR Report	Web	PDF	<a href="#">Distribution</a>

Do not make any changes to the above Page

Click



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## Print Requisition

Run Control ID: mshah

Language: English

☒ Specified ☐ Recipient's

[Report Manager](#) [Process Monitor](#) [Run](#)

**Report Request Parameters**

Business Unit: DEP12

Requisition ID: 1200000671

From Date:

Through Date:

Requester:

**Statuses to Include**

☒ Approved ☒ Canceled ☒ Completed ☒ Open ☒ Pending

Select All

On Hold AND Not On Hold

[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Update/Display](#)

Click the [Process Monitor](#)



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Process List | Server List

Actions

User ID: mshah | Type: | Last: | 1 Days | Refresh

Server: | Name: | Instance: | to: |

Run Status: | Distribution Status: | ☒ Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2487193		SQR Report	PORQ010	mshah	11/11/2013 4:58:29PM CST	Queued	N/A	<a href="#">Details</a>
<input type="checkbox"/>	2487145		Application Engine	FS_BP	mshah	11/11/2013 1:06:52PM CST	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	2487140		Application Engine	FS_BP	mshah	11/11/2013 12:30:14PM CST	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	2487139		Application Engine	FS_BP	mshah	11/11/2013 12:20:36PM CST	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	2487138		Application Engine	FS_BP	mshah	11/11/2013 12:11:28PM CST	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	2487131		Application Engine	FS_STREAMLN	mshah	11/11/2013 10:40:59AM CST	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	2487130		Application Engine	FS_STREAMLN	mshah	11/11/2013 10:27:07AM CST	Success	Posted	<a href="#">Details</a>

Go back to Requisition Print

Save | Notify

When the **Run Status** changes to **Success** and the

**Distribution Status** changes to **Posted**

Click the **Details** link



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### Process Detail

**Process**

**Instance** 2487193

**Name** PORQ010

**Run Status** Success

**Type** SQR Report

**Description** Requisition Print SQR

**Distribution Status** Posted

**Run**

**Run Control ID** mshah

**Location** Server

**Server** PSUNX

**Recurrence**

☐ **Hold Request**

☐ **Queue Request**

☐ **Cancel Request**

☐ **Delete Request**

☐ **Restart Request**

**Date/Time**

**Request Created On** 11/11/2013 4:59:44PM CST

**Run Anytime After** 11/11/2013 4:58:29PM CST

**Began Process At** 11/11/2013 5:00:04PM CST

**Ended Process At** 11/11/2013 5:00:14PM CST

[Parameters](#)

[Message Log](#)

Batch Timings

[View Log/Trace](#)

Transfer

OK

Cancel

Click the [View Log/Trace](#)



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New Wind

### View Log/Trace

**Report**

**Report ID:** 1414801      **Process Instance:** 2487193      [Message Log](#)  
**Name:** PORQ010      **Process Type:** SQR Report  
**Run Status:** Success  
Requisition Print SQR

**Distribution Details**

**Distribution Node:** UNIX      **Expiration Date:** 01/10/2014

File List		
Name	File Size (bytes)	Datetime Created
<a href="#">SQR_PORQ010_2487193.log</a>	1,658	11/11/2013 5:00:14.285940PM CST
<a href="#">porq010_2487193.PDF</a>	2,231	11/11/2013 5:00:14.285940PM CST
<a href="#">porq010_2487193.out</a>	70	11/11/2013 5:00:14.285940PM CST

**Distribute To**

Distribution ID Type	*Distribution ID
User	mshah

[Return](#)

Click the [porq010\\_2487193.PDF](#) link



## Requisition

**Ship To:** FINANCE DEPT - ACCOUNTS DIV  
CITY HALL - 3RD FLOOR WEST  
414 E. 12TH STREET  
KANSAS CITY MO 64106

<b>Business Unit:</b> <b>DEP12</b> <b>APPROVED</b>		
Req ID:	Date	Page
1200000671	11/07/2013	1
Requisition Name:		
1200000671		
Requester		Currency
Shah, Mian		USD
Requester Signature		

Line-Schd	Item	Description	Mfg ID	Quantity	UOM	Price	Extended Amt	Due Date
1-1		test Contracts		1.0000	EA	16.00	16.00	

Buyer: Simpson, Ronnell  
Vendor: 0000000001 UZ ENGINEERED PRODUCTS  
Attn: Shah, Mian

Line Total: 16.00

Total Requisition Amount: 16.00

The Requisition will open.



## Cancel a Requisition:

**Manage Requisitions**

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: DEP12 Requisition Name: Request Status: All but Complete Budget Status: PO ID:

Date From: 11/04/2013 Date To: 11/11/2013

Requester: mshah Entered By:

Search Clear

**Requisitions**

To view the lifespan and line items for a requisition, click the Expand triangle icon:  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
1200000676	1200000676	DEP12	11/11/2013	Pending	Valid	5,001.00 USD	Cancel Requisition Go

Create New Requisition Review Change Request Review Change Tracking Manage Receipts Requisition Report

Canceling a requisition requires that you have the access to do so. If you do,

Select **Cancel Requisition** in the drop down

Click **Go**

**Requisition Details for: Shah, Mian**

Business Unit: DEP12 Date: 11/11/2013  
Requisition Name: 1200000676 Status: Pending  
Requisition ID: 1200000676 Total: 5,001.00 USD

**Line Details**

Line	Item Description	Status	Price	Qty	Total
1	Test	Pending Approval	5,001.00000 Each	1.0000	5001.00

Return to Manage Requisitions Cancel Requisition

Click **Cancel Requisition**





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Favorites | Main Menu > eProcurement > Manage Requisitions

New Window | Help | Personalize Page | http

### Manage Requisitions

**Search Requisitions**

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: DEP12 Requisition Name: Request Status: All but Complete Budget Status: Date From: 11/04/2013 Date To: 11/11/2013 Requester: mshah Entered By: PO ID:

Search Clear

**Requisitions**

To view the lifespan and line items for a requisition, click the Expand triangle icon:  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
1200000676	1200000676	DEP12	11/11/2013	Canceled	Not Chk'd	0.00 USD	Check Budget Go

Create New Requisition | Review Change Request | Review Change Tracking | Manage Receipts | Requisition Report

Requisition Status is **Canceled**

Budget Status is **Not Chk'd**

Select **Check Budget**

Click **Go**

You can **re-open** a cancelled requisition from the drop down window.



## Review a PO:

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### Manage Requisitions

**Search Requisitions**

To locate requisitions, edit the criteria below and click the Search button.

**Business Unit:** DEP12 **Requisition Name:**

**Requisition ID:** 1200000670 **Request Status:** All but Complete **Budget Status:**

**Date From:** 11/04/2013 **Date To:** 11/11/2013

**Requester:** rmshah **Entered By:**  **PO ID:**

**Requisitions**

To view the lifespan and line items for a requisition, click the Expand triangle icon:  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
1200000670	1200000670	DEP12	11/07/2013	PO(s) Created	Valid	15.00 USD	<Select Action> <input type="button" value="Go"/>

**Requester:** Shah, Mian **Entered By:** Shah, Mian **Priority:** Medium

**Pre-Encumbrance Balance:** 0.00 USD

**Request Lifespan:**

Requisition → Approvals → Inventory → Purchase Orders → Change Request → Receiving → Returns → Invoice → Payment

**Line Information**

Line	Description	Status	Price	Quantity	UOM	Vendor	
1	Test Contract removal	PO Created	15.00000	USD	1.0000 EA	UZ ENGINEERED PRODUCTS	<input type="button" value="X"/>

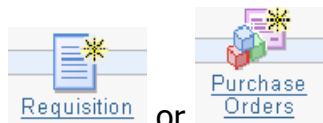
[Create New Requisition](#) [Review Change Request](#) [Review Change Tracking](#) [Manage Receipts](#) [Requisition Report](#)

Enter a Requisition ID

Click

Click the  icon

You can click the



or



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Favorites | Main Menu > eProcurement > Manage Requisitions

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### Requisition Details

Requisition Name	Requisition ID	Unit	Date	Status	Total
1200000670	1200000670	DEP12	11/07/2013	PO(s) Created	15.00
<b>Pre-Encumbrance Balance:</b>		0.00	USD		

Line	Item Description	Source Status	Amount Only	Qty	Price	Status	Total
1	<a href="#">Test Contract removal</a>	Complete	N	1.0000 Each	15.00000 USD	Approved	15.00

PO Information

PO's have been created for this Requisition. To view the PO details for a specific Requisition line click the triangle on the PO Information bar. If there is no PO Information bar then that Requisition line does not have a PO created for it yet.

[Return to Manage Requisitions](#) [Requisition Schedule and Distribution](#)



If you clicked the  link, the above page will open

Click the  icon to open the PO



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Favorites | Main Menu > eProcurement > Manage Requisitions

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### Requisition Details

Requisition Name	Requisition ID	Unit	Date	Status	Total
1200000670	1200000670	DEP12	11/07/2013	PO(s) Created	15.00

**Pre-Encumbrance Balance:** 0.00 USD

Line	Item Description	Source Status	Amount Only	Qty	Price	Status	Total
1	<a href="#">Test Contract removal</a>	Complete	N	1.0000 Each	15.00000 USD	Approved	15.00

PO Information

Find | View All | First 1 of 1 Last

PO No.	PO Status	Vendor	Receipt Status
1200000847	Pending	UZ ENGINEERED	PO Not Received

Approval/Approved PRODUCTS

PO Line Information

Personalize | Find | First 1 of 1 Last

PO Line	Sched #	Due Date	Ship To	PO Qty	Price
1	1	11/07/2013	G50	1.0000	15.00000 USD

PO's have been created for this Requisition. To view the PO details for a specific Requisition line click the triangle on the PO Information bar. If there is no PO Information bar then that Requisition line does not have a PO created for it yet.

[Return to Manage Requisitions](#) [Requisition Schedule and Distribution](#)

The PO information will be displayed.

Click the [Requisition Schedule and Distribution](#) link to review **Requisition Schedule and Distribution** information.



City of Kansas City, Missouri  
ePro Requisitions Training Manual

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Favorites | Main Menu > eProcurement > Manage Requisitions

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### Requisition Schedule and Distribution

**Business Unit:** DEP12      **Requisition ID:** 1200000670      **Total Amount:** 15.00 USD  
**Requester:** mshah      **Req Name:** 1200000670      **Status:** PO(s) Created      **Date:** 11/07/2013

**Line** View All First 1 of 1 Last

**Line:** 1 [Test Contract removal](#)      **Quantity:** 1.0000      **UOM:** EA      **Item Price:** 15.00000      USD

**Schedule** View All First 1 of 1 Last

**Sched:** 1 **Ship To:** G50      **Due Date:** 11/07/2013      **Attention To:** Shah, Mian  
**Quantity:** 1.0000      **Item Price:** 15.00000      **Merchandise Amount:** 15.00      USD

**Distribution** Personalize First 1 of 1 Last

Details | More Details | More Details 2 | Asset Information | Budget Information | **SEE ALL**

Dist #	Status	Dist Type	Location	Req Qty	Merchandise Amt	Percent	GL Unit	Entry Event	Account	Oper Unit
1	Processed		G50	1.0000	15.00	100.0000	KCMBU		601100	

[Return to Previous Page](#)      [Return to Manage Requisitions](#)

Click [Return to Manage Requisitions](#) to go to the beginning of the Requisition, or

Click [Return to Previous Page](#) to return to the PO information page.



## Inquire Receipts:

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Favorites | Main Menu > eProcurement > Manage Requisitions

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### Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: DEP12 Requisition Name: Requestion ID: 1200000677 Request Status: All but Complete Budget Status: Date From: 11/08/2013 Date To: 11/11/2013 Requester: mshah Entered By: PO ID:

Search Clear

### Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req. ID	Requisition Name	BU	Date	Status	Budget	Total	
1200000677	1200000677	DEP12	11/11/2013	Received	Valid	4.00 USD	<Select Action> Go

Requester: Shah, Mian Entered By: Shah, Mian Priority: Medium

Pre-Encumbrance Balance: 0.00 USD

Requisition Lifecycle: Requisition -> Approvals -> Inventory -> Purchase Orders -> Change Request -> Receiving -> Returns -> Invoice -> Payment

### Request Lifespan:

#### Line Information

Line	Description	Status	Price	Quantity	UOM	Vendor
1	Test 2	Received	4.00000	USD	1.0000 EA	UZ ENGINEERED PRODUCTS

Create New Requisition Review Change Request Review Change Tracking **Manage Receipts** Requisition Report

Open a Requisition

Click the [Manage Receipts](#) link



## City of Kansas City, Missouri ePro Requisitions Training Manual

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Favorites | Main Menu | eProcurement | Manage Requisitions

New Window | Help | Personalize Page | http

### Manage Receipts

**Search Criteria**

Received Date From: 10/12/2013 To: 11/11/2013 Show Status: Received/Open  
Business Unit: DEP12 Receipt ID: 000000419 Ship To:  
PO Unit: PO ID:

Search Clear

[Add New Receipt](#) [Process Receipts](#) [Inspection](#) [Review ASN Receipt](#) [Manage Return to Vendors](#)

Enter search criteria and click Search to view existing receipts.

[Return to Manage Requisitions](#)

Click **Search** to review all Receipts, or

Add a **PO Unit:**  **PO ID:**  for a specific PO, or

Add a **Business Unit:**  **Receipt ID:**  for a specific Receipt

Click **Search** after adding a PO or a Receipt #. Receipt will be displayed

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Favorites | Main Menu | eProcurement | Manage Requisitions

New Window | Help | Personalize Page | http

### Manage Receipts

**Search Criteria**

Received Date From: 10/12/2013 To: 11/11/2013 Show Status: Received/Open  
Business Unit: DEP12 Receipt ID: 000000419 Ship To:  
PO Unit: PO ID:

Search Clear

[Add New Receipt](#) [Process Receipts](#) [Inspection](#) [Review ASN Receipt](#) [Manage Return to Vendors](#)

Business Unit	Receipt ID	Date	PO ID	Vendor	Status					
EP12	000000419	11/11/2013	1200000854	UZ ENGINEE-001	Received					

[Return to Manage Requisitions](#)

If no PO or Receipt is selected, then all Receipts will be displayed for the Period as displayed above.



## Procurement Life Cycle:

**Manage Requisitions**

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: DEP12 Requisition Name: Request Status: All but Complete Budget Status: Date From: 11/08/2013 Date To: 11/11/2013 Requester: mshah Entered By: PO ID:

Search Clear

**Requisitions**

To view the lifespan and line items for a requisition, click the Expand triangle icon:  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total
1200000677	1200000677	DEP12	11/11/2013	Received	Valid	4.00 USD

Requisition Cycle Go

Create New Requisition Review Change Request Review Change Tracking Manage Receipts Requisition Report

To view the Life Cycle, add requisition #

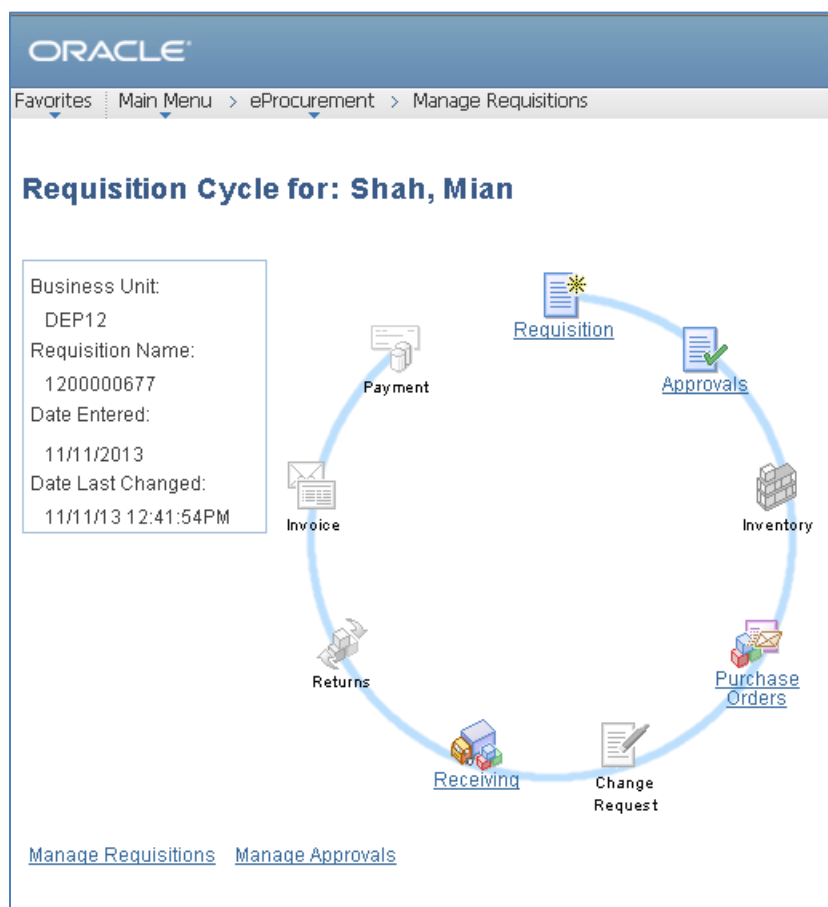
Click

Click the drop down Window

Select

Click





The above Page will open. You can click the **active** icons to open that document.



For example, click the icon to open the PO.



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Favorites Main Menu > eProcurement > Manage Requisitions

### Purchase Order Inquiry

Business Unit: DEP12

**Requisition information** Find View All First 1 of 1 Last

Requisition ID: 1200000677 Line Number: 1

**PO information** Find View All First 1 of 1 Last

PO Number: 1200000854 Buyer: rsimpson Change Order:  
PO Date: 11/11/2013 Vendor ID: 0000000001 Terms: 30 PO Status: Dispatched

**Lines** Personalize Find View All First 1 of 1 Last

Line	Item ID	Description	Merchandise Amt		UOM	PO Qty	Status	Line Details
1		Test 2	4.00	USD	EA	1.0000	Approved	

[Return to Requisition Cycle](#)

Click the [Return to Requisition Cycle](#) link to go back to the previous page.



## Queries:

**Navigation: Reporting Tools > Query > Query Manager**

Query Name	Description
KCM_REQ_INFORMATION	Requisition Information
KCM_REQ_N_APPROVED	Req not approved by Dept
KCM_REQS_W_ERRORS	Reqs with Budget Errors



## Reports:

### Navigation: eProcurement > Reports



## **Requisition status Values:**

*Approved:* Requisition has been approved.

*Complete:* Requisition has been processed through to completion.

*Open:* This status appears by default from the requester setup. The requisition is not eligible to enter the approval process until an authorized user changes its status to Pending Approval.

*Pending approval:* Requisition is eligible to enter the approval process.

*Canceled:* Requisition has been canceled.